

# North Carolina COVID-19 Vaccine Management System (CVMS)

## Provider Portal

## Log In and Getting Started User Guide

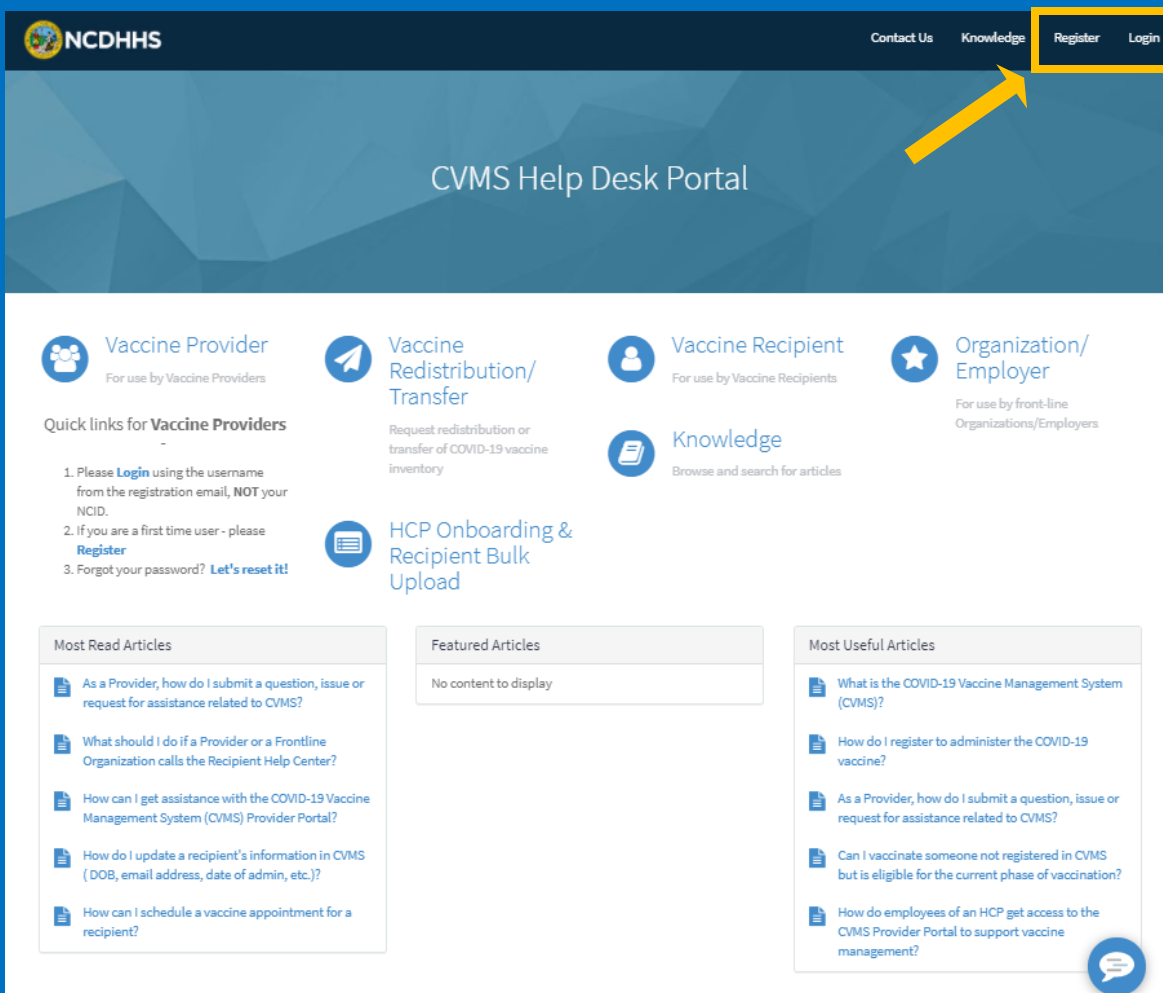
Version 9

June 28, 2021



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the CVMS Help Desk Portal\* at

[https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

You can also call the COVID-19 Vaccine Provider Help Center at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday to Friday: 7 am – 7 pm ET

Saturday & Sunday: 10 am – 6 pm ET

\* On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

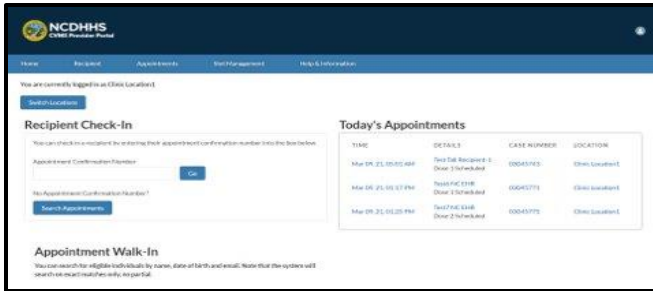
# Table of Contents

---

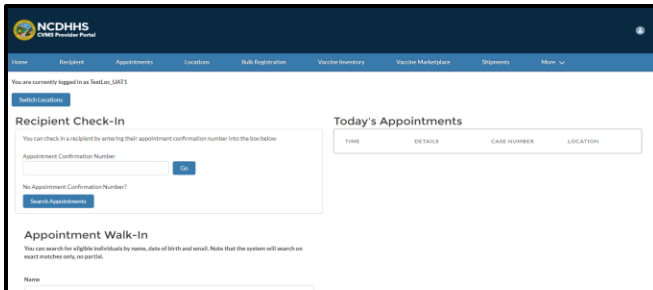
	Pages
Overview	4 – 5
Log in to the CVMS Provider Portal	6 – 11
Navigate the CVMS Provider Portal	12 – 25
Statewide Location Manager Profile: Access additional Locations	26 – 29
Use the Vaccine Virtual Agent	30 – 33
Appendix	34 – 37

# Overview

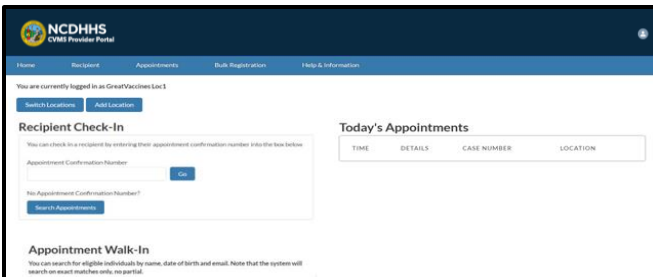
# Overview



Healthcare Provider



Healthcare Location Manager



Statewide Location Manager

The CVMS Provider Portal allows Healthcare Providers in North Carolina to manage the administration of the COVID-19 vaccine. **The CVMS Provider Portal is different than the CVMS Provider Enrollment Portal, where Healthcare Providers enroll in the NC Vaccination Program and maintain their provider agreement.**

When logging in to the CVMS Provider Portal, be sure to have your **NCID USERNAME** and **NCID PASSWORD** available. *If you do not have an NCID username, refer to the Appendix for instructions on how to create one.*

The processes included in this training are for the **Healthcare Provider, Healthcare Location Manager, and Statewide Location Managers** profiles.

For **Statewide Location Managers**, all information for the Healthcare Provider profile will apply to the Statewide Location Manager profile. The **'Add A Healthcare Provider Location'** section is only for Statewide Location Managers.

*Additionally, you will need to:*

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Access the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov>

**Now, let's get started!**

# Log in to the CVMS Provider Portal

# Enter NCID Username and NCID Password

1. Navigate to <https://covid-vaccine-provider-portal.ncdhhs.gov>
2. Click on the **NCID** button
3. Enter your **NCID username** and **NCID password**
4. Click **NCID LOGIN**
5. You are logged in to the CVMS Provider Portal

*For guidance on obtaining an NCID, refer to the Appendix of this User Guide.*

NCID Tips

NCID

Username

Password

NCID Login

Forgot Username  
Forgot Password  
Unlock Account

Need Help? Register!

Privacy and Other Policies Contact Us

WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action. NCC742

## Audience

Healthcare  
Provider

Healthcare  
Location Manager

Statewide  
Location Manager

## Tips

Your NCID username must be linked to your profile prior to your first log in. Contact your Healthcare Location Manager to request to be added to one or more locations set up in the CVMS Provider Portal.

# Enter NCID Username and NCID Password

For users of the CVMS Provider Portal, there will be a confidentiality agreement that appears upon first/next log-in.

1. Read the statement
2. Click on **I AGREE**

Confidentiality Agreement

CVMS is a system of the State of North Carolina, Department of Health and Human Services (NC DHHS), Division of Public Health (DPH) that enables vaccine management and essential data sharing between vaccine administrators, providers, and public health officials, who have authorized and credentialed access to CVMS (Authorized Users). CVMS contains immunization records and other Protected Health Information (PHI), Personally Identifiable Information (PII), and other information confidential under state and federal law (Confidential Information). At all times, CVMS shall only be accessed by Authorized Users consistent with that user's job duties, responsibilities, and level of authorization, exclusively for legally-permitted uses, and only to the extent strictly necessary (Authorized Access). By clicking "[I Agree]" and proceeding further, you are acknowledging you understand and agree with the preceding statements. Additionally, by clicking "[I Agree]" and proceeding further, you understand and agree to abide by all of the following, including the consequences of any violations of: applicable state and federal confidentiality laws; applicable provisions of the NC DHHS Office of Privacy and Security Manual; and applicable provisions of the North Carolina Department of Information Technology (NCDIT) Statewide Information Security Policies. Unauthorized access or use of CVMS or Confidential Information violates the CVMS Terms of Use and Confidentiality agreement and could expose you or your organization to civil or criminal liability.

Users of this system have no expectation of privacy. This system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed, or stored in this system by a user. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to Law Enforcement Personnel. Anyone using this system expressly consents to such monitoring.

Cancel

I Agree

## Audience

Healthcare  
Provider

Healthcare  
Location Manager

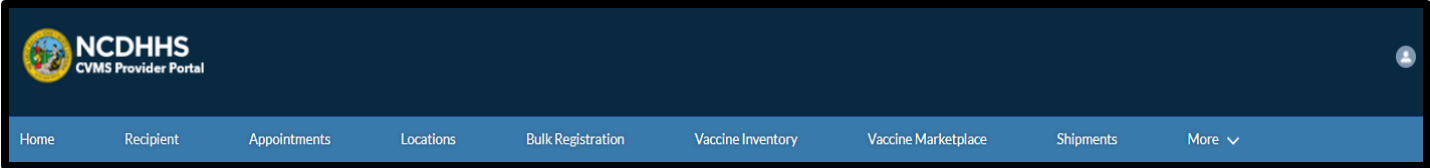
Statewide  
Location Manager



# View the CVMS Provider Portal Tabs

In the CVMS Provider Portal, **TABS** help you navigate between pages. The **TABS** you see are based on your user profile, Healthcare Location Manager, Healthcare Provider, or Statewide Location Manager.

- 1. Users with Healthcare Location Manager profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, LOCATIONS, BULK REGISTRATION, VACCINE INVENTORY, VACCINE MARKETPLACE, SHIPMENTS, ORGANIZATION MANAGEMENT, ACCOUNT MANAGEMENT, REPORTS, and HELP & INFORMATION**



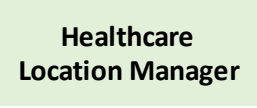
- 2. Users with Healthcare Provider profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, and HELP & INFORMATION**



- 3. Users with Statewide Location Manager profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, BULK REGISTRATION, and HELP & INFORMATION**



## Audience



## Tips

Learn more about managing your recipient’s appointments in the **CVMS Provider Portal Recipient Check-In User Guide**.

# Multi-Location Users Only: Select Location Using 'Switch Location' Before Proceeding

Users associated with multiple locations will have to select a location where you are operating from upon logging in to the CVMS Provider Portal.

When you log in to the CVMS Provider Portal, **please pay attention to the banner at the top of the Home page**. All of your operations in the Portal (e.g., booking appointments, logging vaccine administration) will be attributed to the location that you select. You **will not** be able to complete these task until you pick a location.

1. Click **SWITCH LOCATION**
2. Select the **LOCATION** where you will operate during the day

The screenshot displays the NCDHHS CVMS Provider Portal interface. At the top, a warning banner is highlighted with a red box, stating: "Warning: Please click the 'Switch Location' button and select a location in order to book, view, and complete appointments." Below the banner, the user is logged in as "County General Hospital - Chicago ER". A "Switch Locations" button is highlighted with a red box. The main content area includes sections for "Recipient Check-In" and "Today's Appointments". A modal window titled "Select the location to proceed:" is open, showing a table of locations. The "TestLoc2" row is selected, and the "Submit" button is highlighted with a red box.

Location No.	Street	City	State	Country	Postal Code
TestLoc1	2110 Blue Ridge Road	Raleigh	North Carolina	USA	27606
TestLoc2	2115 Blue Ridge Road	Raleigh	North Carolina	USA	27607

## Audience

Healthcare  
Provider

Healthcare  
Location Manager

Statewide  
Location Manager

## Tips

User associated with multiple locations will have to select a location they are operating from upon logging in to the CVMS Provider Portal.

**If reconnecting after logging out, your location will have been erased and you will need to once again select the location where you are operating from.**

## Logging In to Another Location (if necessary)

At any time, you can switch to another location if you need to support another location by using the **SWITCH LOCATIONS** button.

1. Click on the **SWITCH LOCATIONS** button
2. Select the appropriate location from the list that appears and click **SUBMIT**
3. Please always confirm that your location was switched to the location of your choice by checking the location name displayed at the top of the **HOME** page

The first screenshot shows the 'Home' page of the NCDHHS CVMS Provider Portal. The user is logged in as 'County General Hospital - Chicago ER'. A red box highlights the 'Switch Locations' button. The second screenshot shows the 'Select the location to proceed:' modal. It contains a table with two locations: 'TestLoc1' and 'TestLoc2'. 'TestLoc2' is selected with a radio button, and a red box highlights the 'Submit' button. The third screenshot shows the 'Home' page after switching. The user is now logged in as 'Clinic Location1', and a red box highlights this new location name at the top of the page.

Location No.	Street	City	State	Country	Postal Code
TestLoc1	2110 Blue Ridge Road	Raleigh	North Carolina	USA	27606
TestLoc2	2115 Blue Ridge Road	Raleigh	North Carolina	USA	27607

### Audience

Healthcare  
Provider

Healthcare  
Location Manager

Statewide  
Location Manager

### Tips

Your NCID must be associated to multiple locations to use this functionality. If you are only associated to one location, you will not be able to switch to another location.


If you have a Statewide Location Manager profile, please read **Statewide Location Manager Profile: Add a Healthcare Provider Location** at the end of this User Guide.

# Navigate the CVMS Provider Portal

# Step 1 of 13: View the CVMS Provider Portal Homepage

On the left side of the Homepage, you see **APPOINTMENT WALK-IN**, and on the right-side **TODAY’S APPOINTMENTS**.

Please note that the Date of Birth will be displayed as follows: Year – Month – Day.



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

You are currently logged in as County General Hospital - Chicago ER

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 07:00 AM	Wonder Woman Dose 1 Scheduled	03113939	County General Hospital - Chicago ER
Mar 09, 21, 07:00 AM	Wonder Woman Dose 1 Scheduled	03113943	County General Hospital - Chicago ER
Mar 09, 21, 08:00 AM	NWW Dose 1 Scheduled	03113941	County General Hospital - Chicago ER

## Audience


Healthcare  
Provider

Healthcare  
Location Manager

Statewide  
Location Manager

## Tips

If inactive for 2 hours, the session will expire, and you will have to sign back into the CVMS Provider Portal. **If you are timed out, you will need to start your current action over, as the system will not save where you left off.**



NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

13

# Step 2 of 13: Recipient Tab Overview

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

Shipments

More

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Full name, ex: John Smith

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produc...	Recipient Dose ...	Date of Admini...	Email	Inactive Reason
------------	-------------	-----------	---------------	--------	-------------------	--------------------	-------------------	-------	-----------------

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacturer Na...	Vaccination Administration D...
------------	-----------	---------------	--------	-------------	----------------------------	---------------------------------

No results, please search again.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Point of Care User Guide** at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers>.

The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.

Your search results will also include in the lower section any records of a recipient who received a COVID-19 vaccine dose from a Federal Long-Term Care Facility Program partner (e.g., CVMS, Walgreens) or from a Federal Retail Pharmacy partner (e.g., CVS, Walgreens).

# Step 3 of 13: Appointments Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You are currently logged in as Clinic Org1

Appointments

All Appointments

30 items

Cancel Appointment

Search Appointments

Search by Name, Location, Vaccine Status

Search Case/Confirmation Number

From

2021-04-15

To

Status

--- None ---

Search

Reset

☐ Case

Confirmation ...

Date

Time

Recipient Name

DOB

Location

Cancellation ...

Vaccine Status

Status

## Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

## Tips

The appointments tab will default to show you appointments that are scheduled for the same day for the location you are logged in under.

The **APPOINTMENTS** tab shows a list of appointments in CVMS Provider Portal.

Click the Case Number to view appointment information. You can search appointments by Name, Location, Confirmation Code, Vaccine Status, or Date.

If your location has enabled the scheduling feature in CVMS, this is the tab where you will check-in recipients that scheduled an appointment, cancel an appointment, or schedule a second-dose appointment.

# Step 4 of 13: Locations Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

New

Filter by Name

Filter by Address

Filter by Start Date

Filter by End Date

Location Name	Account	Address	Start Date	Closing Date	
County General Hospital - Popup Location	County General Hospital - Chicago ER	11 W Jones St, Raleigh, North Carolina 27607	03/04/2021	04/10/2021	

## Audience

Healthcare  
Location Manager

## Tips

Learn more about using the scheduling feature in CVMS to manage appointments in the **CVMS Provider Portal Managing Vaccine Site Locator** at <https://covid19.ncdhhs.gov/how-add-edit-and-remove-your-location-vaccine-site-locator-website-user-guide/download> and **Appointment Scheduling User Guide** at <https://covid19.ncdhhs.gov/cvms-provider-portal-manage-appointment-scheduling-user-guide/download>.

The **LOCATIONS** tab can be used to list your location’s details on the Vaccine Site Locator website (<https://vaccines.gov>), and to share your scheduling website to recipients. You can also create additional locations to list on the Vaccine Site Locator website (e.g., a community vaccination event covered by your location). If your location elects to use the scheduling feature in CVMS, your location record links to the scheduling feature in CVMS so that recipients can use CVMS to book appointments at your location.

**Note:** This tab will only be available if you have the Healthcare Location Manager profile.



# Step 5 of 13: Bulk Registration Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

Low Volume (100)High Volume (5,000)

Recipient Upload

If you're uploading 100 employees or less, upload file here.

Drag and Drop CSV file here

Total number of records: 12

Search this list...

First Name

Last Name

Date of Birth

Email

The **BULK REGISTRATION** tab allows you to upload a list of recipients and generate their invitation to register in the COVID-19 Vaccine Portal to receive a COVID-19 vaccine.


## Audience

Healthcare  
Location Manager

Statewide  
Location Manager

## Tips

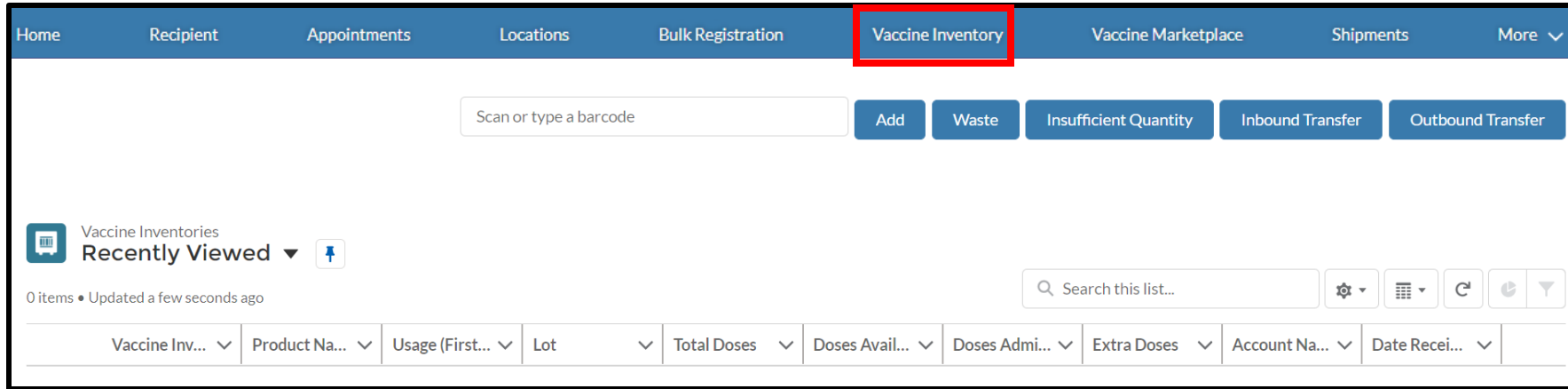
Learn more about uploading your eligible employees or individuals to invite them to register for the COVID-19 vaccine in the **CVMS Provider Portal Recipient Bulk Upload User Guide** at <https://covid19.ncdhhs.gov/cvms-provider-portal-recipient-bulk-upload-user-guide-1/download>.






NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

17

## Step 6 of 13: Vaccine Inventory Tab Overview



The **VACCINE INVENTORY** tab is used to manage your COVID-19 vaccine inventory.

1. To pin a list view, click . The pinned list view will then load as the default list view.
2. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record  (alphanumerically) or its last  (Down Sort icon).
3. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

**Note:** This tab will only be available if you have the Healthcare Location Manager profile.

### Audience

Healthcare  
Location Manager

### Tips

Learn more about managing your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving and Processing Vaccine Shipments User Guide** at <https://covid19.ncdhhs.gov/receiving-and-processing-vaccine-shipments-user-guide/download> and in the **CVMS Provider Portal Vaccine Inventory Deprecation, Transfer and Redistribution User Guide** at <https://covid19.ncdhhs.gov/cvms-provider-portal-inventory-deprecation-transfer-and-redistribution-user-guide/download>.

## Step 7 of 13: Vaccine Marketplace Tab Overview

[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) **Vaccine Marketplace** [Shipments](#) [More](#) ▼

You can utilize Vaccine Marketplace to facilitate transfers with other enrolled providers in your area. If you need additional vaccines for your provider location, please utilize the 'Seek Transfer Match' to identify a location near you to facilitate a transfer. If you are looking to transfer out additional on-hand vaccine inventory, please utilize the 'Seek Transfer Match' to document the amount of inventory you have on hand to transfer out. Please note, you will need to coordinate directly with the other provider to coordinate vaccine transport.

If no transfer is available to fulfill your provider location's needs, please submit a vaccine allocation request through the [NC DHHS Vaccination Allocation Request Form](#).

Note there are several Seek Transfer 'List Views' available to help you filter by Request Type & Status. The 'My Seek Transfer Matches' can be used to view records you have created. You can save your favorite view as your default by clicking the pin icon. You can modify your display between Table & Kanban view by clicking the grid icon.

New Seek Transfer Match

Orders

Seek Transfer Match - All (Active) ▼ 📌

17 items • Sorted by Account Name • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago

⚙️ 📊 🔄 ✎️ 📈 🔍

	<input type="checkbox"/> Order Number <span>▼</span>	<input type="checkbox"/> Request Type <span>▼</span>	<input type="checkbox"/> Account Name <span>▼</span>	<input type="checkbox"/> County <span>▼</span>	<input type="checkbox"/> City <span>▼</span>	<input type="checkbox"/> Product <span>▼</span>	<input type="checkbox"/> Br... <span>▼</span>	<input type="checkbox"/> D... <span>▼</span>	<input type="checkbox"/> Expiration... <span>▼</span>	<input type="checkbox"/> Created Date <span>▼</span>	<input type="checkbox"/> Last Modified D... <span>▼</span>	<input type="checkbox"/> Status <span>▼</span>	
1	<input type="checkbox"/> <a href="#">ORD-0017344</a>	Wanted (to Rec...	<a href="#">Training Team V...</a>	Wake	Raleigh	Pfizer-BioNtech		30		6/9/2021, 11:4...	6/9/2021, 11:4...	Active	<span>▼</span>
2	<input type="checkbox"/> <a href="#">ORD-0017343</a>	Wanted (to Rec...	<a href="#">Training Team V...</a>	Wake	Raleigh	Janssen (J&J)		300		6/9/2021, 11:2...	6/11/2021, 12:...	Active	<span>▼</span>
3	<input type="checkbox"/> <a href="#">ORD-0017342</a>	Extra (to Send ...	<a href="#">Training Team V...</a>	Wake	Raleigh	Pfizer-BioNTec...		150	1/1/2022	6/9/2021, 10:5...	6/14/2021, 11:...	Active	<span>▼</span>
4	<input type="checkbox"/> <a href="#">ORD-0017360</a>	Extra (to Send ...	<a href="#">TestLoc_UAT1</a>	Yadkin	towns...	Moderna (10 d...		100	8/31/2021	6/14/2021, 11:...	6/14/2021, 11:...	Active	<span>▼</span>

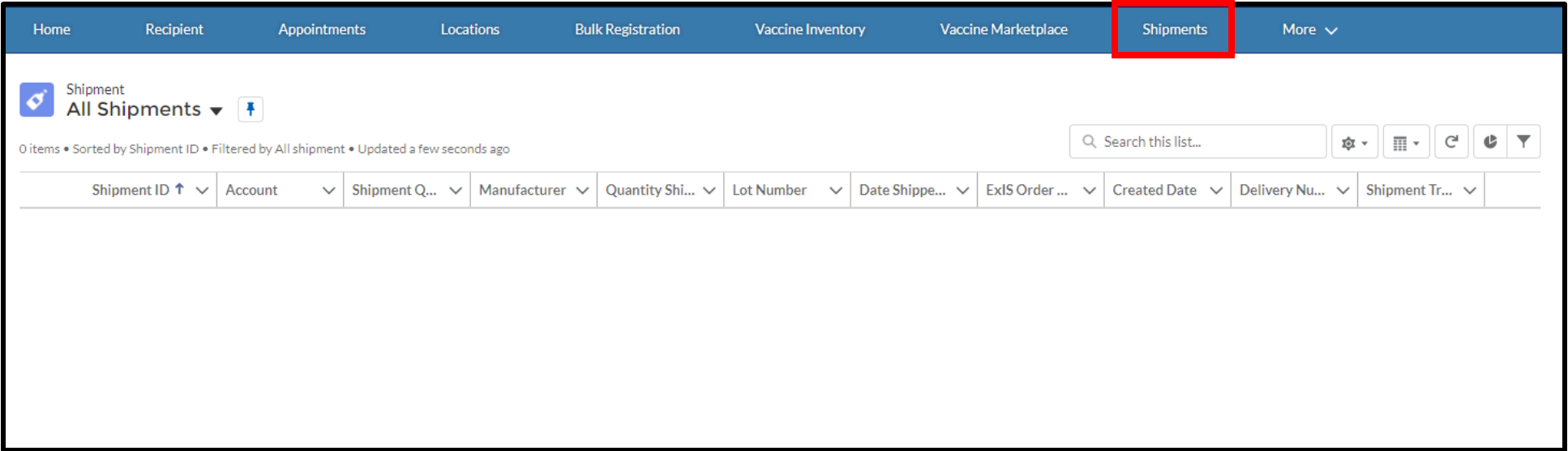
### Audience

Healthcare  
Location Manager

1. The **VACCINE MARKETPLACE** tab allows Healthcare Location Managers to directly communicate and collaborate to arrange for the transfer of vaccine inventory from site to site
2. Healthcare Location Managers can seek matches, place wanted transfers, and place extra transfers.

**Note:** This tab will only be available you have the Healthcare Location Manager profile.

# Step 8 of 13: Shipments Tab Overview



- 1. The **SHIPMENTS** tab allows you to see your location’s COVID-19 vaccine shipment information
- 2. To pin a list view, click . The pinned list view will then load as the default list view.
- 3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column’s first record (alphanumerically) or its last (Down Sort icon).
- 4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

**Note:** This tab will only be available you have the Healthcare Location Manager profile.

## Audience

Healthcare  
Location Manager

## Tips

Learn more about administrating your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving & Processing Vaccine Inventory Shipments User Guide** at <https://covid19.ncdhhs.gov/receiving-and-processing-vaccine-shipments-user-guide/download>.

# Step 9 of 13: Organization Management Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

New OrganizationContact

Organization ManagementHelp & InformationReportsAccount ManagementFiles

AccountsAll Business Accounts

Name

Industry

All

ACCOUNT NAME	INDUSTRY	PHONE	ADDRESS
TESTEmployerOrg	Critical Manufacturing	222-222-2222	asdf asdf asdf 22222
Grace Commercial Org	Commercial Facilities for Essential Goods	555-555-5555	2222 North St Charlotte North Carolina 27603

## Audience

Healthcare  
Location Manager

## Tips

Learn more about Organization management in the **CVMS Provider Portal Organization Management User Guide** at <https://covid19.ncdhhs.gov/media/2391/download>.

The **ORGANIZATION MANAGEMENT** tab allows you to invite essential workers’ organizations to connect to CVMS. Once invited, these organizations can access the CVMS Organization Portal where they will be allowed to upload their list of eligible recipients. These recipients will then be able to register in the COVID-19 Vaccine Portal, saving time when they go to receive their first dose of the COVID-19 vaccine.

# Step 10 of 13: Help and Information Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

Top Articles

General Information

COVID-19 Vaccination Questionnaire

Frequently Asked Questions

Am Eligible For The Vaccine?

When Will The Vaccine Be Available?

Dictionary For Provider Reports

Recipient Vaccination Report Dictionary

HCP Healthcare Roles Report - Dictionary

Inventory Summary Report Dictionary

Organization Management

Help & Information

Reports

Account Management

Files

Audience

Healthcare Location Manager

Statewide Location Manager

The **HELP & INFORMATION** tab allows you to see Frequently Asked Questions and General Information about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccine Registration Form.

# Step 11 of 13: Report Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

ReportsAll Reports7 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Report Name	Description	Folder	Created By	Created On
Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM
HCLM EHR Error Report - Cases		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM

## Audience

Healthcare  
Location Manager

## Tips

Learn more about reporting in the **CVMS Provider Portal Reports User Guide** at <https://covid19.ncdhhs.gov/cvms-provider-portal-reports-user-guide-2/download>.

The **REPORTS** tab is used to access your COVID-19 vaccine reports. Click on **ALL REPORTS** to access the prepackaged reports available to you.

**Note:** This tab will only be available if you have the Healthcare Location Manager profile.

# Step 12 of 13: Account Management Tab Overview

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore ^

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

Search

Reset

Organization Management

Help & Inform

Add Member

Reports

Account Management

Files

Name	Email	Title	NCID	Direct Account Name	Profile	Active
Steve DiGangi	steven.j.digangi_acn@dhhs.nc....		sdigangi_hcp_lm	TestLoc_UAT1	Healthcare Location Mgr	Yes

The **ACCOUNT MANAGEMENT** tab allows you to create user accounts. You can enter their NCID username and expected role for the location you are logged in under.

## Audience


Healthcare  
Location Manager

## Tips

Learn more about Account Management in the **CVMS Provider Portal User Account Management User Guide** at <https://covid19.ncdhhs.gov/media/2368/download>.



# Step 13 of 13: Files Tab Overview



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

Vaccine Marketplace

More ^

Files

Owned by Me

1 item • Sorted by Last Modified Date


Owned by Me

Shared with Me

Recent

Following

Libraries

Title	Owner	Last Modified Date ↓
		5/14/2021, 12:55 PM

Shipments

Organization Management

Help & Information

Reports

Account Management

Files

The **FILES** tab allows certain Healthcare Location Managers to receive customized report files from the CVMS team.

**Note: Most users will not have access to this feature.**

## Audience

Healthcare  
Location Manager

## Tips

Learn more about the Files tab in the **CVMS Provider Portal - Access Custom Reports in Files Tab Job Aid** at <https://covid19.ncdhhs.gov/vaccines/providers/cvms-user-guides-recorded-trainings-and-upcoming-trainings>.

# Statewide Location Manager Profile: Access Additional Locations

# Step 1 of 3: Click on ADD LOCATION

If you are a Statewide Location Manager, you can add new locations to the list of locations for you to select you are operating from by clicking the **ADD LOCATION** button.

- 1. Click on the **ADD LOCATION** button

HomeRecipientAppointmentsBulk RegistrationHelp & Information

You are currently logged in as GreatVaccines Loc1

Switch Locations

Add Location

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
------	---------	-------------	----------

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

## Audience

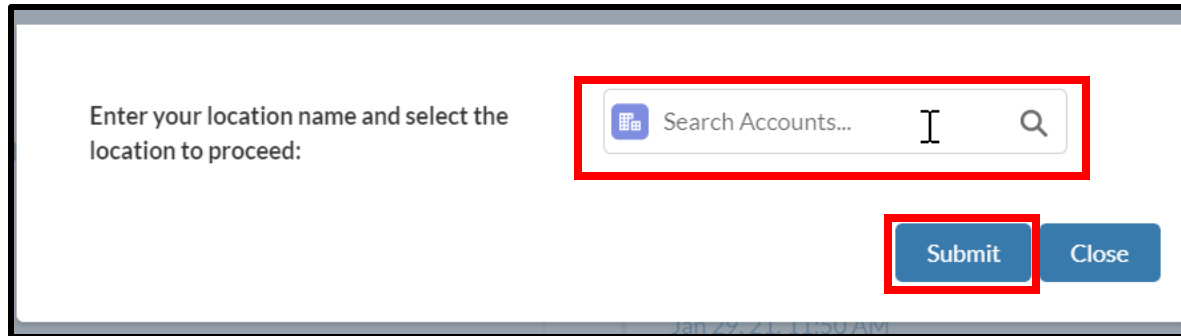
Statewide  
Location Manager

## Tips

Learn more about it in the Statewide Location Manager Profile - Switch Location Job Aid at <https://covid19.ncdhhs.gov/cvms-statewide-location-manager-profile-switch-location-job-aid/download>.

## Step 2 of 3: Search and select the location

1. Search for the location name you wish to add (type the first 3 letters to display the list of locations that starts with that 3 letters)
2. Click on the name of the location you wish to add in the list of search results
3. Click **SUBMIT**



Enter your location name and select the location to proceed:

Search Accounts...

Submit Close

The screenshot shows a web interface for searching locations. It includes a text input field with a magnifying glass icon and a 'Submit' button. The input field and the 'Submit' button are highlighted with red rectangles. The text 'Enter your location name and select the location to proceed:' is displayed to the left of the input field. The 'Close' button is located next to the 'Submit' button.

### Audience

Statewide  
Location Manager

# Step 3 of 3: Switch to the newly added location

- 1. Click on the **SWITCH LOCATIONS** button
- 2. Select the newly added location you wish to login in as
- 3. Click **SUBMIT**

Audience

Statewide  
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as GreatVaccines Loc1

Switch Locations

Add Location

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME

DETAILS

CASE NUMBER

LOCATION

Home

Recipient

Appointments

Bulk Registration

Help & Information

You are currently logged in as GreatVaccines Loc1

Switch Locations

Add Location

Select the location to proceed:

Location No.

Street

City

State

Country

Postal Code

Loc1

2110 Blue Ridge Road

Raleigh

North Carolina

USA

27606

Loc2

2111 Blue Ridge Road

Raleigh

North Carolina

USA

27607

Submit

Close

# Use the Vaccine Virtual Agent

# Launching the Vaccine Virtual Agent

CVMS includes an automated virtual agent to help answer common questions about system use and functionality.

1. From the home screen, click on the **VIRTUAL AGENT ICON** to launch

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryVaccine MarketplaceShipmentsMore

You are currently logged in as TestLoc\_UAT1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jun 28, 21, 02:28 PM	ABCDEF ABCDEF Dose 1 Scheduled	09123266	TestLoc_UAT1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

MM/DD/YYYY

How may I help you?

Click here >>

## Audience

Healthcare  
Provider

Healthcare  
Location Manager

Statewide  
Location Manager

# Vaccine Virtual Agent

*The CVMS Virtual Agent launches in a new window.*

- 1. Read the message, then click **I AGREE**

Vaccine Virtual Agent

We collect session information to personalize your experience, improve the quality of the virtual agent, provide new content and features over time, and analyze the traffic. It includes:

- Your interactions with the Virtual Agent (i.e., text of original questions entered and responses received, buttons clicked, session date and time)

When interacting with the virtual agent, you do not need to enter any personal information (i.e. your name, address, email address, login, password...).

By clicking "I agree", you consent to the collection and use of your information for analytical purposes and for services provided by the Department of Health and Human Services of the State of North Carolina.

I Agree

## Audience

Healthcare  
Provider

Healthcare  
Location Manager

Statewide  
Location Manager



# Vaccine Virtual Agent (continued)

- 2. Select your type of profile
- 3. Answer subsequent questions to find solutions to frequently encountered issues and questions

Vaccine Virtual Agent

Your interactions with the Virtual Agent (i.e., text of original questions entered and responses received, buttons clicked, session date and time)

When interacting with the virtual agent, you do not need to enter any personal information (i.e. your name, address, email address, login, password...).

By clicking "I agree", you consent to the collection and use of your information for analytical purposes and for services provided by the Department of Health and Human Services of the State of North Carolina.

I Agree

Hi! I'm Sophia, the State of North Carolina's virtual agent for Covid-19 vaccines.

I am here to serve Healthcare Providers and Help Desk Representatives.

Before we start, are you a Healthcare Provider or a Help Desk Representatives?

Healthcare Provider

Help Desk Representative

Other

## Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager



NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

33

# Appendix

# How to Obtain an NCID

## Instructions for a user to create an NCID username:

1. Navigate to <https://ncid.nc.gov/>
  2. Click **Register!** (in the bottom right corner of the blue box)
  3. Click **Business** user type option
  4. Complete the required fields to create an NCID
  5. Follow the steps to access your NCID account **and** create your security questions
  6. Once created, you will need to provide the exact first name, last name, email address, and NCID username that you used to create your Business NCID account to the designated Healthcare Location Manager for your location so they can request access to the CVMS Provider Portal for you.
  7. Once access has been granted by NCDHHS, you will be sent an email to notify you that you are able to log in to the CVMS Provider Portal.
- If you have any questions **or need assistance in identifying the Healthcare Location Manager for your location**, please submit all inquiries to the CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).

NCID Tips

NCID

Username

Password

NCID Login

Forgot Username  
Forgot Password  
Unlock Account

Need Help?

Register!

Privacy and Other Policies





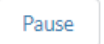
Contact Us

WARNING: This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action. NCC742

# Additional Notes

---

## Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- **\* Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

## Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more details on supported browsers, see [https://help.salesforce.com/articleView?id=getstart\\_browsers\\_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

# User Guide Change Log

Version	Date	Changes Made	Impacted Slides	Author
1	12/10/2020	<ul style="list-style-type: none"> <li>Uploaded the first version of the PPT</li> </ul>	ALL	Training Team
2	1/10/2021	<ul style="list-style-type: none"> <li>Removed any mention of the 2 CVMS Help Desk emails</li> <li>Added Service Now Portal information</li> <li>Screenshot of new bulk upload added</li> </ul>	1, 2, 17, 26, 27	Courtney Seward
3	1/15/2021	<ul style="list-style-type: none"> <li>Updated navigation bars for both CVMS Provider Profiles</li> <li>Updated Recipient Tab search feature</li> </ul>	12, 22	Azalea Troche
4	2/1/2021	<ul style="list-style-type: none"> <li>Updated the screen shots for Location manager to show reports tab on nav bar</li> <li>Added Statewide Profile content</li> <li>Added Reports tab content and Appointments tab content</li> </ul>	9,12,17,18,19,20,21,22, 32	Kristin Clark; Tabitha McKelvy
5	2/12/2021	<ul style="list-style-type: none"> <li>Add Slides for Account Management and Organizational Management</li> <li>Added session expired tip</li> <li>Added multi locations slide</li> <li>Updated screen shots of the expanded more tabs list</li> </ul>	10-11, 24-27	Kristin Clark
6	3/11/2021	<ul style="list-style-type: none"> <li>Added Locations tab slide</li> <li>Changed Scheduling tab to show Locations tab</li> <li>Updated all nav bars for location manager</li> <li>Updated screen shots to show Recipient Check In component</li> </ul>	19, 20	Kristin Clark
7	4/15/2021	<ul style="list-style-type: none"> <li>Updated Recipient screenshot to include e-mail search and Vaccine Product Name</li> <li>Updated Appointments screenshot to include Cancellation status</li> <li>Added “confirmation code” to text to Appointments search</li> <li>Updated Switch Locations screenshot to include current navigation bar</li> </ul>	18, 19, 33	Darrell Lee
8	6/15/2021	<ul style="list-style-type: none"> <li>Added Confidentiality Agreement at first login slide</li> <li>Added Vaccine Marketplace Overview</li> <li>Added Files Tab Overview</li> <li>Updated screenshots to reflect Vaccine Marketplace Tab</li> </ul>	8, 23, 29, 5-29	Darrell Lee
9	6/28/2021	<ul style="list-style-type: none"> <li>Added chatbot/Vaccine Virtual Agent slides</li> <li>Updated branding from MySpot.NC.gov to Vaccines.gov</li> </ul>	12-15, 20	Darrell E. Lee